Admin: Staff Relink

Overview

The Staff Relink function has been developed to resolve the recurring problem of redundant staff records in the database. When two or more staff records represent the same user, the data redundancy cascades through a large number of HiCAMS and Vendor records and eventually causes confusion wherever an Inspector needs to be chosen (Samples, Pay Records, Densities, etc.) Since the redundant staff record problem is ever increasing, it was necessary to create a facility to streamline the data clean up process. This allows the appropriately authorized HiCAMS users to independently clean up the duplicated staff records using the Staff Relink module in HiCAMS.
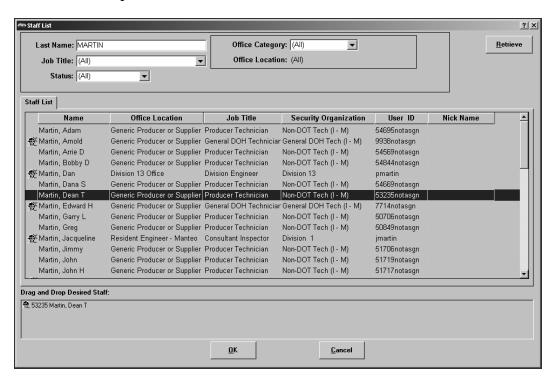
The three functions provided by Staff Relink are Deleting, Retaining, and Merging. A Staff record that is marked Delete is completely removed from the data base. This can only occur for those Staff Records which do not have any other records in HiCAMS linked to them. Retain and Merge are used together to join multiple records that exist for the same staff person. The Retained Staff record is that one which remains in the database. It retains all its own records and inherits the records that are part of the Merged Staff. The Merged Staff record is the one which is removed from the database, and whose records are assumed by the Retained Staff.
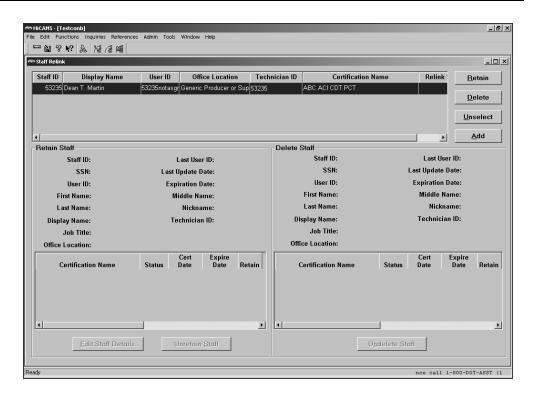
Delete Staff Records

Staff members who are no longer active and have no HiCAMS or Vendor history records associated to their Staff Ident can be deleted. The request for Deletion is made through Staff Relink but the deletion's success or failure is not identified until the weekly Staff Relink process is run. If the Deletion is unsuccessful, the user who requested the Deletion is notified.

Step 1:   Select **Admin ® Staff Relink.**   The **Staff List** window displays.

Step 2: Enter the Last Name of the user to be deleted and click **Retrieve**. Multiple rows may be returned. Select the record of the user to be deleted and drag it down to the lower portion of the window:

Step 3: Click **OK**. The **Staff Relink** window displays the record selected in the top section of the window:

Step 4: Click **Delete.** The **Delete Staff** section of the window is populated with the staff information:

Step 5:   To continue the staff deletion, click the **Save** icon on the toolbar.

Note: *To remove Staff from the relink set, click the **Undelete Staff** button and then **Unselect** to remove the Staff member from the list. Finish by clicking the Save icon on the toolbar and closing the window.*

Step 6:   If finished with the current relink set, click the "X" button to close the window.

To confirm the Relink set is Pending to be processed, generate a **Staff Relink Report**. See <u>Generate a Staff Relink Report</u> for instructions.
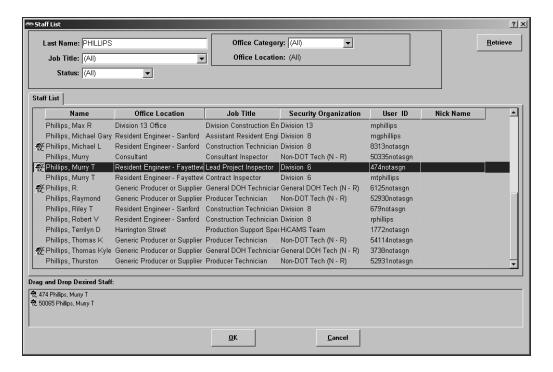
Merge/Retain Staff Records

If multiple records exist for the same Staff person, they can be combined using the Merge staff portion of Staff Relink. The Retained Staff record will be the one which remains in the database. It will retain all its own records and will inherit the records that belong to the Merged Staff record(s). The Merged Staff record(s) are the ones which are removed from the database, and whose records are assumed by the Retained Staff.

Step 1:   Select **Admin® Staff Relink.**   The **Staff List** window displays.

Step 2:   Enter the Last Name of the user whose records need to be merged and click Retrieve. Select the multiple Staff records to be Merged/Retained and drag them to the bottom section of the window.   Click **OK**.
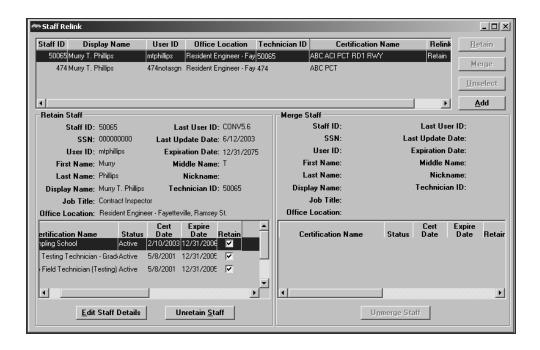
Note: *SHIFT-select to pick adjacent records and CTRL-Select to pick non-adjacent records.*

Step 3:   The **Staff Relink** window displays, with the selected Staff rows displayed in the top portion of the window:

Note: *In this scenario, the user has duplicate records in HiCAMS, and the staff record with the active HiCAMS logon id will be retained. This staff record also contains the most active certifications.*

Step 4:   Review the Staff displayed in the top section of the window. If a Staff record has been selected in error, highlight that row and click the **Unselect** button to remove that record from the relink set. Click the **Add** button to display the **Staff List** window once again and search for the correct Staff record.

Step 5:   Select the Staff record to be Retained by highlighting the row and clicking the **Retain** button. The **Retain Staff** section of the window is populated and the Certification information attached to that Staff record is displayed:

Step 6:   Review the Certifications listed in the **Retain Staff** section. If necessary, remove the check mark from the **Retain** column for the inappropriate certification(s). This Deletes the Certification from the Staff Record. By default, all Certifications are retained. The most recent Certification in each category will be displayed on the Technician Certification Tab in DOH Vendor. Any repeat Certifications with older dates will be displayed on the Technician History Tab.

Note: *If necessary, you may remove the currently selected Staff record from the Retain status by clicking the **Unretain Staff** button.*

Step 7:   Select the Staff record to be Merged by highlighting the row and clicking the **Merge** button. The **Merge Staff** section of the window is populated and the Certification information attached to that Staff record is displayed:
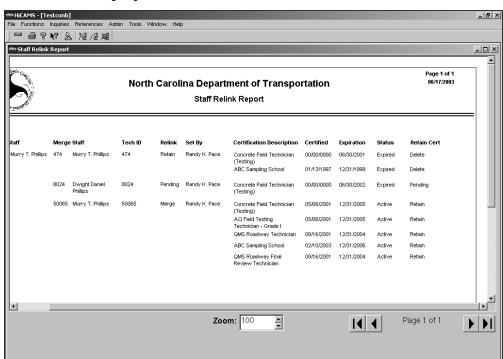
Note: *If necessary, you may remove the currently selected staff record from the Merge status by clicking the **Unmerge Staff** button.*

Step 8:   Review the Certifications listed in the **Merge Staff** section. If necessary, remove the check mark from the **Retain** column to Delete the inappropriate Certification(s).

Step 9:   Click the Save icon on the toolbar. To Merge additional Staff records on the existing list, repeat Steps 7 and 8. A Save must be performed after each Merge. To incorporate other Staff records into this Relink set, click the Add button. The Staff List is again displayed, and additional Staff members can be selected, and then Merged.

Step 10:   Close the window to complete the Relink process.

To confirm the Relink set is Pending to be processed, generate a **Staff Relink Report**.

Generate a Staff Relink Report

Step 1:   Select the **Staff Relink Report** name from the **Select A Report** window. This report is only available to people who have access to the Staff Relink Function.

Step 2:   Click **Generate**. The **Staff Relink Report** Preview window displays:

Step 3:   Review the report contents for accuracy. For example, the above report displays the following requested changes pending:

- Tech ID #474 and corresponding Certifications have been retained. However, the Certifications attached to the (*retained*) Staff Record for Tech ID #474 are *Expired* (see **Status** column) and also been marked for deletion (see **Retain Cert** column).

- Tech ID #50065 has been removed from the system and the corresponding Certifications have been attached to Tech ID #474. (A Notification will be sent after the weekly job runs to request these Certifications be re-printed with Tech ID #474).

- Tech ID #8024 has a Relink Status of "Pending"; this indicates that the Record was selected for Relink, but no action was taken. Therefore, after the weekly job runs, this staff record will remain unchanged (no action will be taken).

The Report can be printed for your records. The **Staff Relink Report** information will record Staff Relink sets completed each week, and will be purged following the completion of the weekly task, which is run automatically by HiCAMS each Sunday evening.

Historical information on completed Relink sets is done by generating Staff Relink queries.

Generate Staff Relink Queries

Information contained on the **Staff Relink** Report is purged weekly following the completion of the automated weekly task. However, a query can be generated to review all previously completed Relink Sets:

Step 1: From the **Inquiries** menu, select **Query Tools ® Staff Relink History.**

Step 2: The **Query Selection – Staff Relink History** window displays:

Step 3: Select the appropriate Columns to display using Criteria as required to generate the desired results. The following is an example of a query designed to provide information (including Merged/Deleted Certs) on Merged, Deleted or Retained Staff for user rpace for the previous week:

The Criteria Columns indicate that only Relink Sets performed on June 17th, 18th, and 19th by user rpace will be displayed.

Step 4: Click **Generate**. The **Snapshot Report** window will display the query results:

HiCAMS - [Testconb]

File   Edit   Functions   Inquiries   References   Admin   Tools   Window   Help

Query Selection - Staff Relink History [<New>]

Snapshot Report (2 Rows)
(Size columns and press Preview)

Merge/Delete Cert Relink	Merge/Delete - Display Name	Merge/Delete - Technician ID	Retain - Technician ID	Merge/Delete Cert Date	Merge/Delete Cert Exp Date	Relink OK	Merge/Delete - Non-DOT Company	Merge/Delete Certification
06/18/2003	Murry T. Phillips	474	50065	01/13/1997	12/31/1999	Y	C. W. BROWN	ABC Sampling Sch
06/18/2003	Murry T. Phillips	474	50065		06/30/2001	Y	C. W. BROWN	Concrete Field Technician (Testing

☑ Unique Rows

Total tables in query is   5
Maximum tables allowed is 16

Generate   Preview   Reset   Alter   Labels

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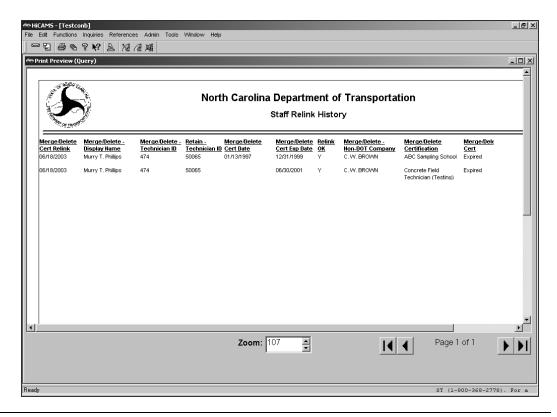**Step 5:** Move columns and resize as necessary to fit columns on printed report.

Step 6: Click **Preview**. The **Print Preview** window displays:

HiCAMS - [Testconb]

File   Edit   Functions   Inquiries   References   Admin   Tools   Window   Help

Print Preview (Query)

North Carolina Department of Transportation

Staff Relink History

Merge/Delete Cert Relink	Merge/Delete - Display Name	Merge/Delete - Technician ID	Retain - Technician ID	Merge/Delete Cert Date	Merge/Delete Cert Exp Date	Relink OK	Merge/Delete - Non-DOT Company	Merge/Delete Certification	Merge/Dele Cert
06/18/2003	Murry T. Phillips	474	50065	01/13/1997	12/31/1999	Y	C. W. BROWN	ABC Sampling School	Expired
06/18/2003	Murry T. Phillips	474	50065		06/30/2001	Y	C. W. BROWN	Concrete Field Technician (Testing)	Expired

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Step 7:   Click the **Print** icon on the toolbar to print the Query Report. Compare results against previously printed Staff Relink Standard Reports.